JACK O'CONNELL
State Superintendent of Public Instruction

August 1, 2003

To: County and District Chief Business Officials
      Charter School Administrators
      County Auditors

From: Janet Sterling, Director
        School Fiscal Services Division

Subject: New Software for the Principal Apportionment System

As you are aware, we have been working on improving the software used to collect and process data for purposes of the Principal Apportionment. The existing Principal Apportionment software has not been significantly revised since its original design in 1963 and is obviously outdated and cumbersome. The new software we are creating will provide you with a mechanism to collect, consolidate, and edit attendance and revenue data necessary for us to determine the state apportionment for K-12 education. At this point in time, we have partially completed the new software, but it will be fully implemented at the 2003-04 First Principal Apportionment in February, 2004.

Because we are developing the software in stages, we want to clarify the implementation schedule. The school district data collection software, implemented at the 2002-03 First Principal Apportionment (P-1), included school district and charter school average daily attendance. At the Second Principal Apportionment (P-2) county offices used the Attendance Software-County Log-on Supplement to collect county office of education, school district, charter school, and SELPA attendance and tax data. For the 2002-03 Annual Apportionment, attendance data will be submitted using the new data collection software version 2.05 and tax data will be submitted using software version 1.01. Revenue limit data will still be collected in the same format as in previous years.

All revenue, attendance, and tax data will be collected through the new software at the 2003-04 P-1; it will have several new features to enhance your ability to collect data and estimate apportionments. The software will eliminate paper-based forms and replace existing software, and reduce the cycle time associated with collecting apportionment-related data. We will be offering training on the revenue and attendance software in October (dates to be announced), with the software itself available to you in November.

For planning purposes, we are enclosing the *Calendar of Key Deadlines, 2003-2004 Apportionments*, with due dates for the various apportionment documents and other reports necessary for us to determine your funding. A copy of these deadlines, as well as an up-to-date listing of CDE apportionment staff can be found at *<http://www.cde.ca.gov/fiscal/principal_app>*.

We want to stress the importance of meeting the due dates established each fiscal year. While we understand the significant workload you and your staff struggle with on an ongoing basis, it is critical that we receive your data in a timely manner. Please make every effort to meet the due dates, thereby enabling us to meet all mandated principal apportionment certification dates. If there is a problem sending us the information on time, or if you have corrections once the information has been sent, please contact our apportionment unit staff immediately.

Thank you for your continued support in improving the software. Your comments have been very helpful and we look forward to continuing to work with you to ensure a successful implementation of the new Principal Apportionment software. If you have any questions, please contact Melissa Collier at (916) 445-7354 or by e-mail at *mcollier@cde.ca.gov* or Shelley Goode at (916) 324-4530 or by e-mail at *sgoode@cde.ca.gov*.

JS:zb
Enclosure